

Note: Print this page before beginning the tutorial. Then click the Back button on your browser to return to the Examiner Resource page and print the supplementary Site Visit materials cited in the 'Steps to Follow', below.

Overview of the Site Visit Process

The site visit is Stage 3 of the evaluation of applications for the Malcolm Baldrige National Quality Award. The Panel of Judges selects applicants that will receive a site visit at the end of Stage 2, Consensus Review. The purpose of the site visit is to clarify uncertain points in the applications and to verify that the information presented in the applicant is correct. Clarification and verification is managed on site through use of Site Visit Issue (SVI) Worksheets.

Prior to the site visit, the team leader (in conjunction with team members) must do extensive preplanning, most of which is conducted by telephone, fax, and overnight delivery. The site visit includes visits to one or more of the applicant's locations. At the start of the site visit, all team members meet off site to finalize strategies, procedures, and assignments. To conclude the site visit process, the team meets off site again to complete its site visit scorebook. The site visit scorebook is submitted to the Panel of Judges and forms the basis for the Panels' decision whether or not to recommend the applicant for the Award. It is also the basis of the feedback report to the applicant.

Site Visit Tutorial

This web-based tutorial provides guidance in preparing Site Visit Issue Worksheets and samples of Worksheet findings and conclusions that could be discovered on site. It is designed to assist Examiners in understanding how to complete Site Visit Issue Worksheets that will ensure a clear trail of findings and conclusions leading from the Consensus scorebook comments to the Site Visit scorebook comments. Please follow the steps below, which include reference to key documents that will facilitate your successful participation in the Site Visit Process. Should you have any questions regarding the Site Visit process please contact your Site Visit Team Leader, the Examiner Hotline at 877-237-9064 or email at BNQPeLearning@nist.gov.

Learning Objectives:

1. Identify how to use key processes or Results scoring factors for an assigned Item to organize and focus the Site Visit Issues (SVIs).
2. Review 2-4 SVIs relevant to these processes for Item 3.2.
3. Note how the strategy for Item 3.2 ensures all opportunities for improvement (OFIs), all double pluses and all strengths in the Consensus Scorebook are addressed through the SVIs.
4. Review an SVI, strategy, findings, conclusions, and revised comments for Item 7.1.
5. Describe how findings and conclusions should be reported to ensure clear linkage between a consensus comment and the corresponding site visit comment.

Steps to Follow:

1. Review the Site Visit Manual, which you received from ASQ. For purposes of the tutorial, focus on the 2004 Site Visit Changes on the first page of the manual and the Stage 3 Process Flowchart in Section 2.
2. Print off or download and view the following materials, which are available at http://www.baldrige.nist.gov/Examiner_Resources.htm
 - ☐ Site Visit Issue Worksheet Resource Sheet
 - ☐ Guidance from the Panel of Judges on Site Visit Issue Worksheets
 - ☐ Item 3.2 Annotated Item Worksheet, Guidance on completing Process Item Site Visit Issue Worksheets, and sample 3.2 Site Visit Issue Worksheets
 - ☐ Item 7.1 Annotated Item Worksheet, Guidance on completing Results Item Site Visit Issue Worksheets, and sample 7.1 Site Visit Issue Worksheet
 - ☐ Frequently Asked Questions
 - ☐ Evaluation
3. Refer to Site Visit Issue Worksheet Resource Sheet. *Note the descriptions for Item Reference, comment(s) affected, Strategy, Findings, and Conclusions.*
4. Review all Item comments holistically found in the Item 3.2 and 7.1 Item Worksheets
 - a. For Item 3.2, see how SVIs were developed around the Criteria requirements or primary processes: see underlined text in 3.2 Item Worksheets.
 - b. For Results Item 7.1, see how the site visit issue was developed around the Results scoring factors of segmentation and comparisons.

Note: samples are provided on Strategy, Findings, and Conclusions for SVI 3.2-1 and SVI 7.1-1

5. Review the SVI Worksheets for 3.2-1 and 7.1-1. Analyze how a strategy was developed to ensure that all key themes, all opportunities for improvement, all double-plus strengths, and all single strengths that tie to a key theme are verified or clarified. Note all documents needed for review. Also, see the list of people (by name, responsibility, or position) to interview—this would be used in developing an interview schedule for the applicant. Numbering the questions and recording the associated comment numbers from the “Comment(s) affected” section of the worksheet helps organize the findings and conclusions.
6. See in the samples how each critical comment (as described in point 5 above) is mapped to one or more SVI to ensure they are verified or clarified. Notice how the original and revised comments are listed in the samples. (Some teams use a matrix to record the linkages and ensure all comments are covered.)
7. Understand that on site the team reviews each comment, strategy, finding, and conclusion to ensure linkage between the original Consensus comment and the final Site Visit comment. This helps the team and the judges to clearly understand how and why the comments changed from Consensus to Site Visit and what impact these changes had on scoring.

Evaluation:

Please take a moment to evaluate the Just-in-Time Site Visit Tutorial. Once completed, the survey can be emailed as an attachment to BNQPeLearning@nist.gov